

# The **\*\*Magic\*\*** Behind SRHelp

[srhelp@umn.edu](mailto:srhelp@umn.edu)

-OR-

5-2803



ASR TRAINING & SUPPORT TEAM

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UNIVERSITY OF MINNESOTA

# Who we are

- Renae Faunce
- Sally Gutierrez
- Heather Micek
- Jenn Selander



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# Why are we here today?

- Connect names to faces/voices
- Internal Audit findings
- Redesigned web site
- Demo the UPK/Help link in PS
- Our portfolio has grown over the years



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# Scope of our work

- Training/Support for college/dept/faculty on PS Campus Solutions & other student systems
- System/business process knowledge & expertise
- Training Update newsletter - monthly
- SR Help workshops
- Astra iCop
- Well connected to: ASR IT, OTR, OCM, ASR Comm
- We are NOT 1-HELP



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# What we train & support

## *PeopleSoft - Campus Solutions*

Service Indicators	Credit Exemptions	Student Groups
Academic Standing	Student Advisor	Milestones
Quick Enroll	Enrollment Request	Block Enrollment
Student Program/Plan	Term Activation	Permission Numbers
Application Processing (Pro)	Wait Listing	Transcripts ...and more

# What *else* we train & support

- Astra Events and Astra Schedule
- CCS (Collaborative Class Scheduling)
- PCAS (Program Curriculum Approval System)
- ECAS (Electronic Course Authorization System)
- Reporting Center - Student Services Reports
- Faculty Center (Grades, Class Lists)

# Our production support volume

- Resolved **8500** ServiceNow tickets last year
- **9.7%** are escalated to analysts
- Handle **175** per week/avg
- Fielding **450** during the busiest week



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# Where are the training materials/resources located?

- [www.asr.umn.edu](http://www.asr.umn.edu)
- UPK/Help link in PeopleSoft



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# Questions or Suggestions?

Let us know at:  
[srhelp@umn.edu](mailto:srhelp@umn.edu)

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# PeopleSoft Upgrade Internal Audit Discussion

RAC

May 1, 2017

# Information gathered from University community

Two surveys were developed to seek input from advisors and faculty go-tos (faculty support) on various aspects of the upgraded student system.

- Advisors: a total of 650 surveys were sent and 246 responses were received (a 38% response rate).
- Faculty go-tos: a total of 332 surveys were sent and 151 responses were received (a 46% response rate).

# Feedback

Feedback was organized into three categories

- General survey feedback on areas of concern
- System issues
- Common enhancement requests

# General survey feedback on areas of concern

- Availability of real-time help or training for processes that changed with the Upgrade
- Location of help guides on PeopleSoft pages
- Helpfulness of reports
- Higher demand of advisor time from students regarding registration. Students need assistance from advisors to register
- Faculty go-tos reported that Schedule Builder is not easy and convenient to use
- Faculty go-tos indicated faculty are not able to search for classes

# **Student Degree Progress + Student Success Analytics**

**May 2017**



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# What is SDP SSA?

**The Student Data & Analytics team is looking to create tools that provide/combine:**

- Data analytics
- Predictive modeling
- Benchmarking and collaboration
- Assessment to help address academic barriers
- Identification of areas for systemic improvement

# What is the goal?

## **Increase student success at the University.**

The Provost has put this project as a priority:

- Improve student access, retention and outcomes
- Create strategies to improve the quality of advising without increasing burden
- Identify curricular pathways and barriers
- Create tailored intervention strategies for at-risk students
- Provide “administrators” with predictive data



# APLUS and SDP SSA

- APLUS is a robust advising tool developed and widely used at the University.
- SDP SSA will provide additional information not currently available in APLUS.
- If data is of value to the community, we will evaluate how it can be incorporated into APLUS (Phase II).

**SDP SSA will *not* replace APLUS**

# How could SDP SSA data be used?

- Finding high-risk students that may need additional assistance
- Finding degree plan success rates for students who receive certain grades in major courses
- Provide query capability and dashboard
- Provide Student Transfer dashboard
- Management reports for student degree progress
- And much more

# Project timeline

Timeline being created

- April - Related Entry Last Touch report
- April - Enterprise Data Warehouse  
Undergraduate Degree Progress begins
- April - Report requirements gathering
- Summer - enrollment trends reports (CLARA)

Started:

- Student Characteristics Data priorities
- Retention Risk Predictive Model Prototype

***Initial focus is on undergraduate students.***

# Involvement

SDP SSA Steering Committee,  
Advising Steering Committee, Associate Deans,  
Collegiate Student Degree Progress Team,  
Advising group “voluntold” by above

- Willingness to participate (volunteers, etc.)
- Requirements gathered
- Recommendations from collegiate SDP group
- Getting a diverse sample  
(to test the tool/reports)

What is this - project formerly  
known as EAB...  
Questions

# 13-Credit Exemption Process changes

RAC

May 1, 2017



# PeopleSoft Internal Audit Recommendations

- Improve online instructions
- Notify students of submission
- Provide timeframe of approval

# Changes

- New initial instructions
- A completion window and confirmation email
- Students routed back to the MyU instead of the PeopleSoft Student Center





# New Initial Instructions

## Credit Exemption Request



Credit Exemption Request

Undergraduate degree-seeking students are charged a flat tuition rate based on 13 credits. Any credits beyond 13 are available at no additional charge. It is recommended to register for 15 or more credits each semester to maintain timely progress toward degree completion and to maximize financial aid resources. If it is necessary for you to enroll in less than 13 credits, you may apply for an exemption from the 13-credit policy and be charged at a per-credit rate.

Please make your selection

- I want to apply for a waiver.
- I choose to do nothing at this time.



# No changes to the form

13-Credit exemption request

13-Credit Exemption Request

Should you complete this form?

**Yes**

- You are seeking an undergraduate degree at the University of Minnesota, Twin Cities, and have circumstances preventing you from taking 13 or more credits.

**No**

- You are a graduate student.
- Students who have a disability for which Disability Services has determined that a reduced credit load is appropriate accommodation.
- Students who work full-time for the University and are going to school on a Regents Scholarship Program.
- Non Degree Students.

Complete your information:

ID / Name      4932081      Clare Baumgart

Prog / College      17UGR      College of Liberal Arts

Email ID      nmherman@umn.edu

Telephone            Year of high school graduation       (YYYY)

This request is for:

Permanent Reduced Credit Load:       Temporary Reduced Credit Load:

(Note: The deadline to file for a reduced credit load is the end of the 4th week of the semester)  
If approved:

For situations that will last one semester.

# Completion window

Undergraduate degree-seeking students are charged a flat tuition rate based on 13 credits. Any credits beyond 13 are available at no additional charge. It is recommended to register for 15 or more credits each semester to maintain timely progress toward degree completion and to maximize financial aid resources. If it is necessary for you to enroll in less than 13 credits, you may apply for an exemption from the 13-credit policy and be charged at a per-credit rate.

Please make your selection

I want to apply for a waiver

I choose to do nothing at this time

Click to Continue

Confirmation of Credit Exemption Request

Help

Your Credit Exemption Request form has been submitted.

You will be contacted by your college once they have reviewed your request. Thank you.

OK

# Confirmation email



**Appserv-acsqat1** <ccopssa@umn.edu>

3:38 PM (1 minute ago) ☆



to me ▾



Your Credit Exemption Request form has been submitted. You will be contacted by your college once they have reviewed your request. Thank you.



# Next steps

- Investigating possible process enhancements using PeopleSoft 9.2 functionality

# Policy Discussion

RAC

May 2017



# Makeup Work policy

- Revised policy will be effective Fall 2017
- Remainder of this term: instructors can still require documentation for single episode medical absences *if they choose*
- SCEP may revisit some language based on feedback

# Upcoming policy review

One remaining 2017-18 SCEP meeting

- Grading & transcripts - forming a work group
- Maximum credit conversation has concluded



# Policy review for 18-19

- Grading and transcripts policy
- Due for review
  - Email as official communication method
  - Withholding transcripts / holds on records
  - Class scheduling
  - Enrolling in overlapping or back-to-back classes

# Policy concerns/requests

What's on your policy wish list?

Most common policy questions?

Potential items to address:

- Policy defining academic credit and pay vs. credit
- Other?

# Questions & Discussion



# Student Emails Longevity

4/2017

Susan McKinney, records retention  
Stacey Tidball, chief privacy officer, academics  
Sue VanVoorhis, data custodian, academics

## Decision

**Student emails for graduate, professional, undergraduate, non-degree and non-credit students will be deleted 10 years after inactivity. (Existing rules about how long the accounts remain active are not changing.)**

## Emails definition

Emails received and sent during the time as a student (does not include google docs)

## Need for plan

Maintaining emails indefinitely exposes the university to greater risk in the event of hacking, data breaches, or litigation/subpoenas.

## Communication plan

Students will receive information regarding the University of Minnesota's procedure for deleting emails after account inactivity. There is/will be a service for porting emails out of the umn.edu account and into a different account.

Full plan needs to be developed.

## Documents, research, projects stored with the University

A plan for deleting or archiving this material is not being addressed with this procedure or at this time.

# End of Term Processing

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May 2017



ACADEMIC SUPPORT RESOURCES

UNIVERSITY OF MINNESOTA

# End of term processes

- Grading
- Bracketing
- Degree Clearance
- Diplomas
- Academic Standing (undergrad)
- Satisfactory Academic Progress (SAP)

# Grading

- Last day instruction: **May 5**
- Last day finals: **May 13**
- Final grades due: **May 17**
- Communication about best practices to instructors is forthcoming
- Grade rosters now default to final grade

# Faculty grading

- Cannot upload grades after due date
- Grade change required after NRs posted
- All coursework, projects, papers, tests, etc. should be completed for the course by the last day of the term
- Policy is “grades due 3 business days after the last exam”



# Bracketing

- Begin running the day after grades are due
- Continue running up until the start of the term and a bit after (less frequently).
- Email [otr@umn.edu](mailto:otr@umn.edu) if you need anything bracketed that seems like it has been missed.

# Degree Clearance (Undergrad)

- Confer date: **May 13**
- Spring 2017 clearances due **June 7**
- All degrees will be posted by OTR by **June 12**

# Diplomas

- Diploma reports pulled after the posting deadlines
- After that, they appear on the weekly backdate report
- FedEx option (particularly for international students)
- Soft launch - pickup request for undergrads

# Diploma Staffing Transition

- Kathy Georges retiring in June
- Diploma responsibilities transitioned to 3 OTR staff members:
  - Liz Johnson
  - Trung Mac
  - Chelsea Weber
- Inquiries, as usual, should go to [otr@umn.edu](mailto:otr@umn.edu)

# Academic Standing/SAP

- [Dates are posted online](#)
- Fall 2016 clean-up run **May 18**
- Academic standing calculations will be running **May 19 - May 25**
- Spring 2017 SAP run: **May 23**
- Deadline to place P3 service indicator: **June 1**
- Start summer FA disbursement: **June 5**

# Questions?

Friendly reminder:

Always email [otr@umn.edu](mailto:otr@umn.edu) for any  
student records inquiries

# Transfer Evaluation System (TES)

Stacey Tidball

May 2017



# TES project goals

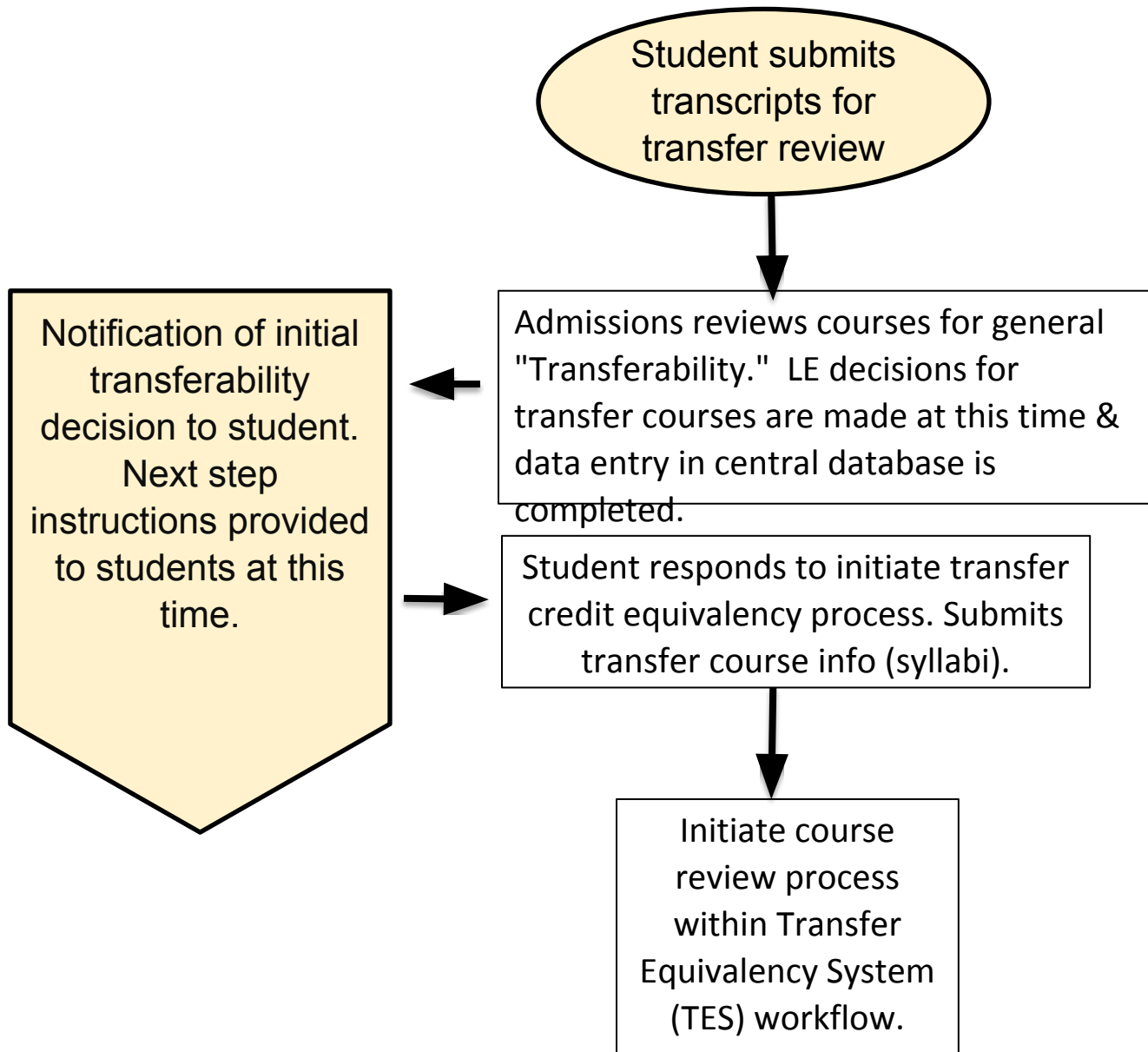
- Centralized system of record for transfer equivalencies
- Consistent experience for students
- Transparency in transfer equivalencies, and expiration



# Project update

## Next steps:

- Designating dedicated project manager & business analyst to support the project
- Meetings with colleges & departments this summer to review current process and determine requirements





College Representative  
DUGS Transfer Coordinator

Initiate course review process within Transfer Equivalency System (TES) workflow.

Approved department representative receives request to review course for "Equivalency".

TES initiator receives equivalency decision thru TES workflow – Decision history will stay housed in TES.

Data entry into central database.  
Transfer Credit Process Complete. One synced system housing all transfer equivalency decisions.  
**APAS reflects all equivalency decisions made.**

Equivalency Decision Report distributed to colleges.

Notification of equivalency decision communicated to student.

# Financial Aid Preparation and Timelines

RAC  
May 1, 2017



# Financial aid preparation

1. Fill out a FAFSA

[www.fafsa.gov](http://www.fafsa.gov) →



2. Check FA steps to assess what needs to be done -

3. Use the on-line scholarship application to apply for scholarships

# Timeline



FAFSA opens October 1 -  
2 yrs going at same time

**Estimated** awards for incoming NHS -  
mid-February

**Estimated** awards for incoming NAS -  
IUT mid- to late-March

**Remove** estimated awards - June

# Timeline

**Actual awards - July**  
(for all undergraduate students)

**One time event - new borrowers**

Complete Master Promissory Note &  
Entrance Loan Counseling

**Disbursement of aid -**  
10 days prior to the term start



# Satisfactory Academic Progress (SAP) Appeals

RAC

May 1, 2017





# What is SAP and why do we do it?

What: SAP - Satisfactory Academic Progress

Why: Federally mandated

Assesses:

- Completion ratio - 67% of courses attempted
- Cumulative GPA - 2.0 (undergrad)
- Maximum timeframe to degree - 150% of total credits for a degree (180 for undergraduate)

# Important Dates

SAP Run for Spring 2017

5/23/17

P3 Placement

6/1/17

# What happens to students if they don't meet SAP criteria?

## SAP warning

- Notified that they are about to be out of compliance

## SAP suspension

- Notified that they are not in compliance and are not eligible to receive any additional financial aid

# Can they appeal?

Yes



# What does this entail?

Student complete the SAP appeal [form](#)

Adviser completes 'Section D. Adviser's statement and academic plan.'

Completed form is submitted to OSF

Form and documentation reviewed by OSF staff and either approved or denied

# Our call to action for you

- Be honest about the student situation and ability to complete degree
- Attach the plan to the SAP appeal
- Verify that the student is enrolled in the courses needed to complete

Questions?



# Getting in front of complete drops

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May 1, 2017



# What is this and why do we care?

- Process to stop students from completely withdrawing without speaking with someone
- Enforced within PeopleSoft
- Opportunity to talk with student:
  - Financial impact (FA, loan repayment, R2T4)
  - Progress impact
  - Process impact
- Many schools do this already
- If possible, want to intervene

# Our ask

- Small, short-lived committee:
  - Create process
  - Draft policy language (maybe)
  - Establish exceptions

Who is interested?



Questions?

